

Beauty & Covid-19

How social distancing is changing beauty rituals



Key findings

15 May 2020

The experiment nobody wished for

Though [many US states are tentatively starting to reopen](#) businesses with myriad restrictions in place, the absence of a vaccine or cure for Covid-19 means the path to 'normal' will be a bumpy one, characterized by skittish consumers and start-stop attempts. The days of social distancing and remote work are far from over for Americans. To help beauty brands navigate this new landscape and better understand their customers in this unprecedented time, we surveyed beauty consumers between April 9th and 15th, in peak lockdown, to understand their changing beauty habits and the psychology behind them in times of restricted social interaction.

As for many industries, the Covid-19 lockdown has created a unique set of conditions that allow us to test and better understand consumer behaviors and thought patterns—a naturally-occurring experiment (that nobody wished for). Which beauty trends will endure, even accelerate, in the wake of the pandemic? And which will lose their footing?

How beauty rituals change when nobody is watching

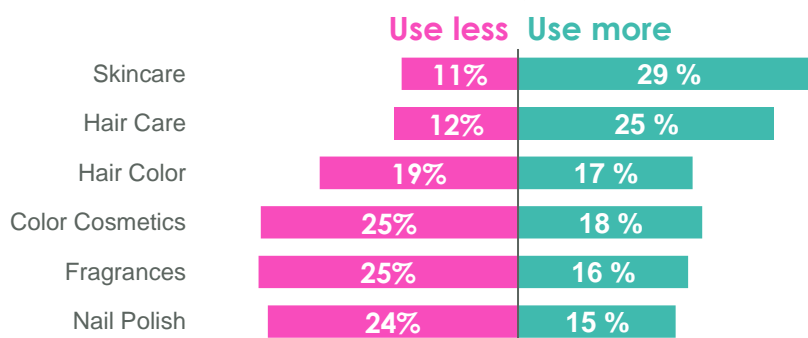
Usage is shifting from instant gratification categories to longer-term care.

During stay-at-home orders and with fewer face-to-face interactions to justify getting dolled up, about a quarter of Americans reported using less color cosmetics (25%), fragrances (25%), and nail polish (24%) than they would have normally. Those toning down the use of these three categories outweigh the subset who say they are using more.

Meanwhile, categories that focus on care (i.e. skincare and haircare) are seeing more Americans increase their usage, as they have more time at home to indulge in these routines.

Quarantine measures have created a unique opportunity for the at-home boxed hair color category. Over a third (34%) of Americans who typically get their hair colored at a salon are planning to or have already colored their hair themselves during the lockdown.

Impact of Coronavirus on usage of given beauty products



Are you using more or less of the following types of beauty products now than you would have usually before Coronavirus?
2,000 US adults

A welcome change

For those using color cosmetics less, over a third report feeling relieved that they don't have to wear them anymore (35%) and say they are enjoying feeling like a more natural version of themselves (39%). These feelings seem to resonate with Americans from the South most, with 43% feeling relieved and 45% enjoying the more natural version of themselves. However, not everyone appreciates the option to follow lower-maintenance beauty routines—A smaller share (28%) say they miss wearing cosmetics, and a fifth (21%) say they don't feel like themselves when not wearing them.

Reactions to wearing less color cosmetics during Coronavirus (% of those who are wearing less)



You mentioned you are applying color cosmetics (e.g., foundation, blush, lipstick, eyeshadow etc.) less during Coronavirus. To what extent do you agree or disagree with each of the following statements? 496 US adults using color cosmetics less

Cosmetics habits may not fully bounce back

Of those that have decreased their use of color cosmetics, the majority (66%) plan to resume wearing the same amount they did before Coronavirus when life returns to 'normal,' whenever that may be. A smaller share (15%) expect to continue wearing less and an additional 12% are not sure.

Midwesterners are most likely to go back to their old ways (75%), while nearly a fifth (18%) of people in Western states expect to stick to their more natural look. That said, with many [speculating that Covid-19 will accelerate the remote work trend](#) and change our working patterns for good, beauty brands must prepare for a more permanent shift than consumers are able to anticipate.

Young Americans are turning to cosmetics to pass the time

Though usage of color cosmetics on the whole has dropped during Covid-19, young Americans (18-34 year olds) are bucking the trend and are more likely to use their new free time to apply cosmetics. Over a third (36%) are using color cosmetics more than before compared to only 18% of the general population. This is reflected in an expected increase in their spend on cosmetics—Nearly half (47%) of young Americans who use cosmetics are expecting to spend more on color cosmetics during Coronavirus than they usually would have. The increased spend seems to be coming from across the

spectrum of beauty products, with two fifths (43%) treating themselves to higher-end or luxury products more and a third (33%) buying cheaper beauty products more.

Our research suggests young Americans are turning to cosmetics to give them something to do, with nearly a fifth (17%) of cosmetic wearers saying they apply color cosmetic to pass the time. We have also seen an increase in young Americans watching online beauty tutorials or unboxing videos, with two fifths (42%) watching more online beauty tutorials and roughly the same proportion (43%) watching more unboxing or 'haul' beauty videos.



17% of young people wearing cosmetics in lockdown are applying it to pass the time



43% of young Americans are watching more unboxing or 'haul' beauty videos

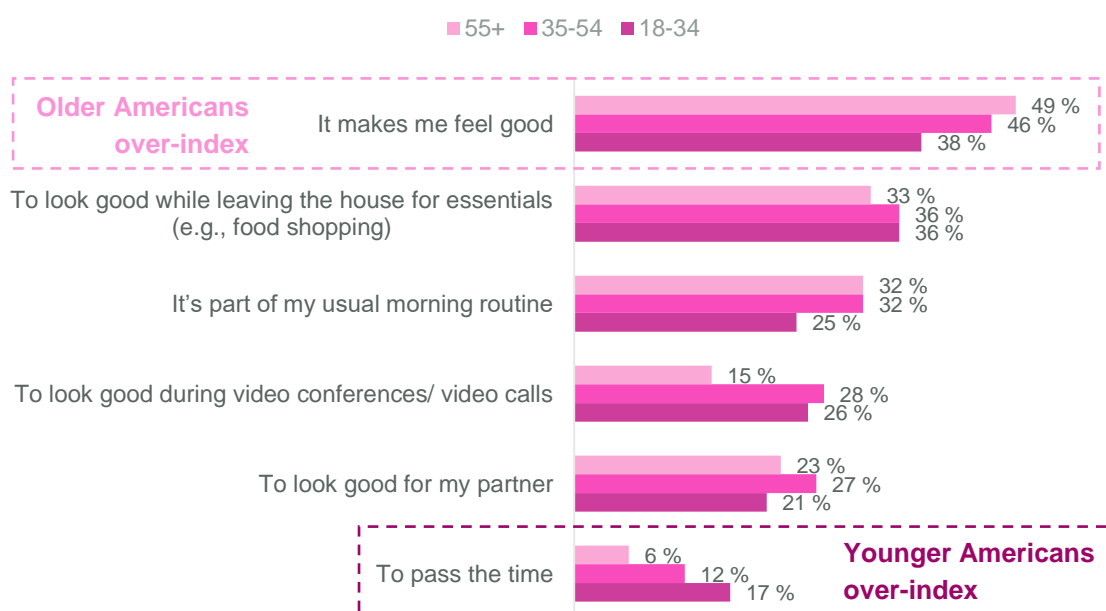


42% of young Americans are watching more online beauty tutorials

Americans turn to beauty as a form of self-care during this difficult time

For 44% of Americans wearing cosmetics in lockdown, applying cosmetics acts as a pick-me-up during this bleak time—They say they do it because it makes them feel good. Older American cosmetics users are more likely to be applying cosmetics during the lockdown for this reason (49% of those aged 55+) compared to only two in five (38%) young Americans.

Reasons Americans are wearing cosmetics during Coronavirus, by age (% of those wearing cosmetics)



Why are you applying color cosmetics (e.g., foundation, blush, lipstick, eyeshadow etc.) during Coronavirus? 1,120 US adults using color cosmetics during Coronavirus.

While the use of cosmetics might be down, we have seen an increase in the use of products designed to care for you, with three in ten (29%) using skincare more and a quarter (25%) using haircare products more. A fifth (20%) of Americans report that they've been following longer and more elaborate skincare routines during lockdown and over a quarter (28%) are using more face masks. Similarly, a fifth (20%) are using more hair treatments. As with the use of cosmetics in lockdown, younger Americans over index in the use of caring products—more than a third (36%) have been using more face masks and hair treatments. Beauty products are also serving as an affordable way for consumers to 'treat themselves' during lockdown, with 23% of Americans saying they have indulged more in higher-end or luxury beauty products during their time at home.

Impact of Coronavirus on beauty activities



Are you doing more or less of the following activities now than you would have usually before Coronavirus? 2,000 US adults

Can beauty brands and salons make their businesses more resilient to social distancing?

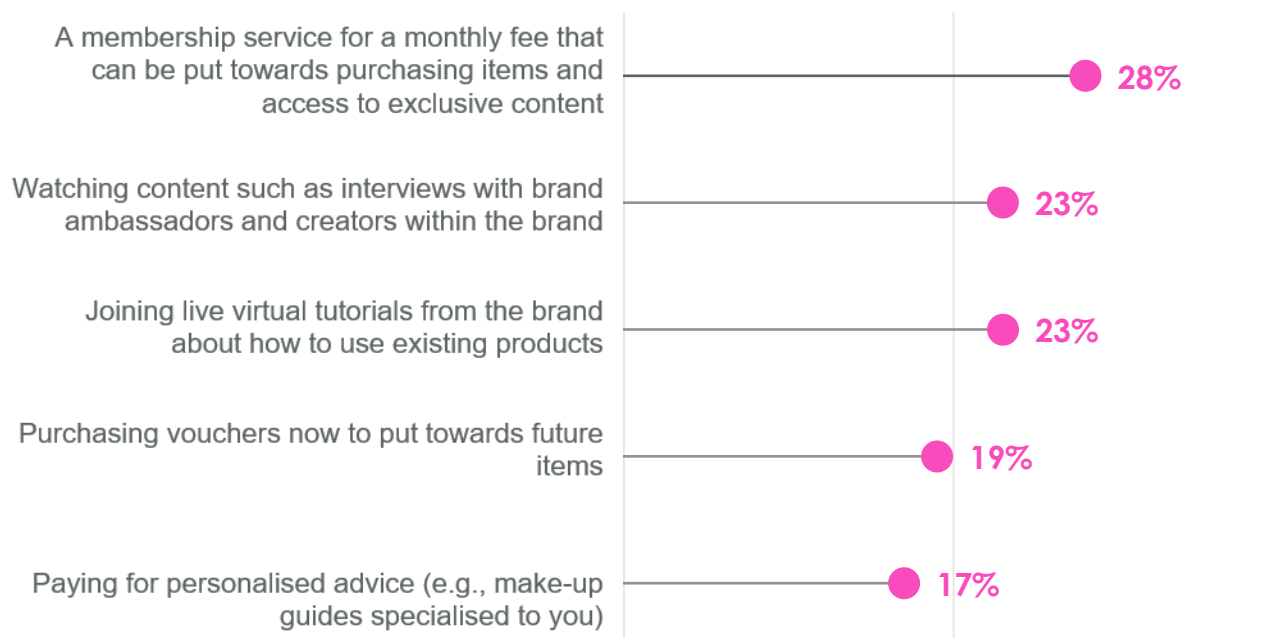
To look into this we presented respondents with restriction-friendly ways they could engage with beauty brands to measure their appeal. Among heavy cosmetic users (i.e. people who are wearing color cosmetics 5 or more days a week during Coronavirus) the most popular option (28% were interested) was a membership scheme with a monthly fee that can be put towards purchasing items and that gives them access to exclusive content in lockdown, as well as access to exclusive items once restrictions are lifted. Just under a quarter (23%) said they would be interested in watching content such as interviews with brand ambassadors and joining virtual tutorials from the brand.

But ultimately, there is no silver bullet.

That said, many of these options may only appeal to highly engaged beauty fans. In fact, 66% of beauty consumers say they are not interested in engaging with beauty brands during Coronavirus restrictions. With budgets getting slashed, companies must weigh whether these additional outreach efforts are truly worth the investment.

Interest in interacting with Beauty brands during Coronavirus

(% of heavy cosmetics users)



In which of the following ways would you be interested in engaging with beauty brands during the Coronavirus crisis? 383 US adults who are heavy users of color cosmetics during Coronavirus

Opportunities for hair salons

We also looked into how hair salons might be able to engage with their customers under lockdown. Among Americans who would normally go to the hair salon, the most popular way to engage is watching a how-to video for different hair styles (17%), particularly among men (20% vs. 14% of women) and young people (27%). In fact, men were more interested in every type of touchpoint with salons during lockdown as they depend on more frequent haircuts and have been forced by quarantine to take matters into their own hands. Men are about twice as likely as women to express interest in personal consultations (17% vs 9%) and video chat assistance to guide them through cutting their hair at home (16% vs 8%). One way salons could diversify their income to protect against future lockdowns could be to offer vouchers for future services—14% of salon customers under lockdown said they would be interested in this, with this increasing to 18% of men and 18% of those aged 18-34.

What next?

With the uncertain road ahead involving an elevated rate of remote work and various degrees of social distancing for the foreseeable future, beauty brands must focus on ways to 'future proof' their brands. Positioning beauty products and rituals as a form of self-care remains fertile ground to engage consumers across age groups during this challenging time—The data suggests Covid-19 will only accelerate this trend. Further, brands that can embed digital touchpoints into their consumer engagement schemes and appeal to younger, digitally-savvy consumers who view beauty as a form of entertainment are most likely to successfully weather the storm.

We'd love to hear from you. For more insights reach out at hello@opinium.com.

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